



# **The Common Access Card – Appointment Scheduler**

Administrator Instructions and Process Guide for  
Setting Up Sites and Managing Appointments  
6 February 2006

## **Introduction**

The Common Access Card – Appointment Scheduler (CAC-ES) is a web enabled method for controlling the flow of personnel to Common Access Card (CAC) issuance locations. Users log onto the CAC-ES web site and manage their own appointments via a self-service interface. Administrators have the ability to set-up and monitor the appointment schedule, and make adjustments as necessary. In this way issuance locations experience a steady, manageable, stream of people seeking cards, instead of an unpredictable demand on their services.

It is recommended that the web address (URL) for the CAC online issuance appointment scheduler is broadcast to the user population via emails and public relations avenues. After the initial implementation and public introduction phase, users will be able to access the URL via a link from the CAC Program Management Office home page (<http://pmo.cac.navy.mil/Issuance.aspx>). It is recommended that sites provide hot links from their local intranet homepages directly to their specific appointment scheduler. URLs for scheduler administrator functions will not be published or distributed. They will be given only to authorized administrators for their specific site.

## **Administrator Roles**

Three positions within each site require some level of administrator responsibility: The Site Security Managers (SSM), the CAC Installation Coordinator (IC), and Senior Verifying Officials (SVO). It is recommended the SSM be given primary administrative responsibility for accessing and manipulating the online appointment scheduler. It is recommended that administrative privileges be granted to as few as possible so as to control the ability to create and/or update site information. Administrative access is password-protected for each registered administrative user.

The IC will be required to coordinate scheduling in cooperation with the CNI CAC Program Management Office (CAC PMO) including issuance demand priorities in accordance with site requirements. Following initial setup the IC will not be required to utilize administrative functions of the scheduler, but will identify scheduling timeframes from a broad, site-wide perspective and will remain a liaison with the CAC PMO on an as needed basis. It is recommended that time allotted for a site's issuance not be determined by "best-case" optimization, but that a broader scope of time be planned to accommodate unanticipated delays.

The SSM will initiate appointment scheduling in accordance with site priorities and in the manner deemed most efficient by the site itself (i.e., by codes, by buildings, by functional areas, etc.). The SSM also helps to determine, based on experience and continuous feedback throughout the issuance process, the number of minutes required for appointments.

The SVO is supervisor and oversight for a given building within a site. The SVO supervises the workload and efficiency of Verifying Officials (VO) and workstations within a building (whether mobile or permanent), and reports system failures or slowdowns within workstations directly to the SSM. The SVO must observe the scheduled appointments on a regular basis for his/her building and notify their SSM of schedule discrepancies, light workloads, and VO availability.

## **Administration Web Pages**

The administration web pages are designed to let CAC issuance personnel set-up, monitor and control the CAC issuance appointment schedule for their site.

## **How to Access the Site**

Once Site and Administrator IDs are established, and access rights are provided to site administrators, Common Access Card – Event Scheduler (CAC-ES) Administration web pages may be accessed over the Internet via a web browser. The URL is:

<https://es.cac.navy.mil/setup.pl>

- where XXXX is enter the assigned Site ID provided by the CNI CAC PMO for your location

## **Adding an Issuance Location to the Scheduler**

For use of the scheduler, the term “Site” will signify a catchment area identified for CAC issuance. The term “Building” will signify a location within a given site, whether mobile, temporary, or permanent. One or more CAC issuance workstations will reside in each building.

To have a location added to the CAC-ES web site, complete the CAC Event [Scheduler Data Gathering form](#) provided via the web and submit it by FAX or email to CNI CAC Program Management Office.

FAX: (850) 452-5123

Email: [PNSC\\_ISSupport@navy.mil](mailto:PNSC_ISSupport@navy.mil) with subject line “CAC Web Scheduler”.

The CAC PMO Web Scheduler support team will reply within two working days of receiving the form. Once the request for a new site has been processed, they will provide a URL for the new site and training, via telephone, on how to use the various interfaces.

## Setting up a New Site

After the CNI CAC PMO Web Scheduler support team has added the new site to the database, and provided the URLs, to the Administrator the following steps must be completed:

- Create the buildings (issuance locations) for the site
- Create the schedule for appointments (create time slots)
- Release the URL for making appointments to the user population, with instructions

Buildings are the issuance locations for the Common Access Card. There can be more than one issuance location per site, base or organization and even per physical building, but each location should have its own entry in the database.

Time Slots are the framework for the appointment schedule and administrators have complete control over appointment availability at their site.

Releasing the URL via an “All Hands” email is usually the fastest way to get the URL to the people targeted for issuance. The URL can be embedded as a link in the message, allowing readers to click on the link and launch their browsers towards the sign-up web pages. Instructions on what to bring to the appointment should be included in the email.

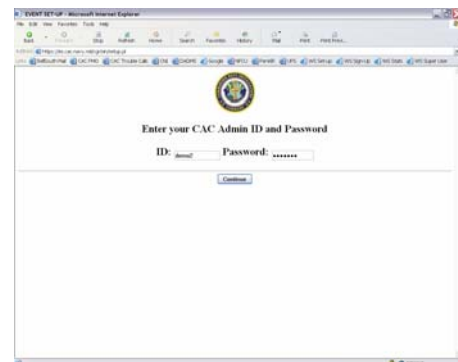
The CNI CAC Program Management Office will coordinate the initial setup of each site’s appointment scheduler if requested by site Installation Coordinators. Site Security Managers for CAC issuance operations will provide issuance appointment timeframes, points of contact, and other information using a CAC Appointment [Scheduler Data Gathering form](#). Site Administrators will be responsible for maintaining schedule availability once their CAC Appointment Scheduler web site is operational. Typically, the initial set up can be accomplished in less than a half a day.

## The Interface

The administrator’s interface does not require any software other than an Internet browser. Anyone who can use a browser can use this interface.

## Logging In

This is the first page that will be encountered. To log into the Administrator’s web pages, enter an Administrator’s ID and password into the appropriate fields and click the “Continue” button.



## Log on IDs

All CAC ES Administrator Log in IDs are entered into the CAC-ES system for administrators by the CNI CAC PMO. The naming convention normally followed will be in the format of first initial of the administrators first name followed by the full last name. Example Paul Rennie will have a user log on ID of premmie.

## Passwords

Passwords are set when an administrator logs in using an ID for the first time. Passwords are encrypted and stored in the Web Scheduler database. Care should be taken to safe guard and remember the password IAW applicable regulations. If forgotten, the CNI CAC Program Management can only clear the old password out of the system to allow the Administrator to reestablish a new password. Passwords must adhere to NAVCIRT COMPUTER TASKING ORDER (CTO) 06-01.

- Minimum of 9 characters
- 2 lower, and 2 uppercase letters
- 2 numbers
- 2 special characters
- Changed every 60 days
- Password history set to minimum of 5\*
- Unsuccessful logon attempts set to 3 with a count reset to 3 within 60 minutes\*

\* CAC-ES currently does not allow these items and will be updated in the future.

## The Home Page

This is the main menu page for the Administration web site. It shows the name of the site that it controls, has a link to a process guide for USN and USMC issuance and four function buttons. The CAC-ES uses IP addresses to direct people to the appropriate site web pages. If the site displayed on this page is not the site that was intended, please check the URL to insure that the site name is correct.



## The Function Buttons

### Time Slots

To Create, Modify, Delete or Display appointment time slots, click the “Time Slots” button.

### Display Appointments

To view the appointments for a given period, click the “Display Appointments” button.

## [Buildings](#)

To create or modify building records, click the “Buildings” button.

## [Find Appointments](#)

To find the record for a particular appointment, click the “Find Appointments” button.

## Display Appointments

This function lets administrators view the appointments made for a given period. Issuance personnel can then print out the appointments displayed for use. **A note of caution** Appointments are made and cancelled in real time. A list printed out at 0700 hours may well be out of date by 1100 hours.

To display appointments, select the desired building from the “Building” pop-down menu. Next, enter the range of dates of interest in the “Appointment Date From” and “To” data fields. If you want to look at only one day, then put the same date in both fields. Finally, click the “Search” button and a page listing the appointments for that time period will be displayed. If there are no appointments, then the message “No appointments match your search criteria” will be displayed.

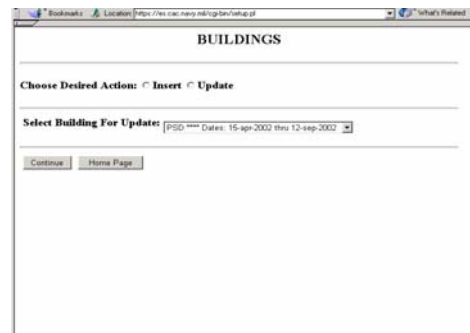
The “Building Info” button provides a listing of all the buildings for that site, with telephone numbers and directions to those facilities.

## Buildings

Buildings are the issuance locations for the Common Access Card. There can be more than one issuance location per site, base or organization and even per physical building, but each location should have its own entry in the database. The Buildings menu allows administrators to add or modify the buildings of their sites.

Until the first building has been entered into the database, the Building menu page will display the message, “No buildings have been entered yet for this site.”

To create a building, click the ‘[Insert](#)’ radio button and then the “Continue” button. To update an existing building, click the ‘[Update](#)’ radio button, select the desired building from the list and then click the “Continue” button.

A screenshot of a web browser displaying a form titled "BUILDINGS". The form has a header section with the title "BUILDINGS". Below the header, there is a section labeled "Choose Desired Action:" with two radio buttons: "Insert" and "Update". The "Insert" radio button is selected. Below this, there is a section labeled "Select Building For Update:" with a dropdown menu. The dropdown menu is open, showing a list of buildings. Below the dropdown menu, there are two buttons: "Continue" and "Home Page".

## Inserting a Building

To insert a building, fill in the required data and then click the “Insert This Building” button.

- The Building ID is a four-character key for database tracking and it must be unique for each building at a given site. Users will not see this ID when they make an appointment.
- The POC should be a person at the issuance location who is available to help users. Only the telephone number will be displayed on public web pages\*.
- Building Instructions should include directions on how to get to the location and any special instructions on what to bring, or wear, to the appointment.
- Building Status determines if users can see a building when they log in to make their appointment. Select the “Inactive” radio button to keep people from making appointments at that location. Otherwise, make sure that the “Active” radio button is selected.
- Publish POC Data determines if the telephone number for that building appears in the Building Information available to the Users\*. Selecting ‘No’ will leave users without a way to directly contact that location assistance.

This screenshot shows a web browser window with the URL <https://es.cac.navy.mil/cgi-bin/setup.pl>. The page title is "Search Criteria For APPOINTMENTS At Site PSD NAS Fallon". The form includes a "Building" dropdown menu set to "PSD \*\*\*\*" and "Dates: 15-apr-2002 thru 19-sep-2002". There are input fields for "Appointment Date From:" and "To:". Below these, a note states: "(To restrict the search to one day, enter the same date for FROM and TO)". Another note says: "(You can also include a 24-hour clock time with a date. Example: 7/16/01 14:30)". At the bottom of the form are three buttons: "Search", "Building Info", and "Home Page".

This screenshot shows a web browser window with the URL <https://es.cac.navy.mil/cgi-bin/setup.pl>. The page title is "BUILDING INSERT". The form contains several input fields: "Building Name:", "Building ID:" (with a note "(abbreviation)"), "POC Name:", "POC Phone:", and "POC E-Mail:" (with a note "(System Cancellation Lists Sent Here)"). There is a large text area for "Building Instructions: (Directions)". Below the text area, there are two radio buttons for "Building STATUS:" with "Active" selected and a note "(Warning: SIGN-UP Users Do Not See Inactive Buildings!)". There are also two radio buttons for "Publish POC Data On The 'Building Info' page?" with "YES" selected. At the bottom are two buttons: "INSERT This Building" and "Home Page".

\* In accordance with information security guidelines, no administrator's names or email addresses are displayed on public web pages.

After filling in all the data fields, click the “Insert This Building” button.

## Updating a Building

Changes may be made to the records of existing buildings. Click the “Update” radio button on the Buildings menu, select the building to be modified from the pop-down menu and then click the “Continue” button.

The data fields on this page are the same as for the Insert Buildings page. The only difference is that the *Building ID* can’t be changed. It is a key field in the database and is therefore unique for any given building.

The screenshot shows a web browser window with the address bar displaying 'https://es.cac.navy.mil/cgi-bin/setup.pl'. The page title is 'BUILDING UPDATE'. The form contains the following fields and controls:

- Building Name:** Text input field containing 'PSD'.
- Building ID:** Text input field containing 'PSD'.
- POC Name:** Text input field containing 'John Doe'.
- POC Phone:** Text input field containing '555-555-1212'.
- POC E-Mail:** Text input field containing 'doeJ8ps1.navy.mil'. To the right of this field is a link: '(System Cancellation Lists Sent Here)'.
- Building Instructions: (Directions):** A large text area containing the text 'Main pass and tag office.'.
- Building STATUS:** Radio buttons for 'Active' (selected) and 'Inactive'. A warning message follows: '(Warning: SIGN-UP Users Do Not See Inactive Buildings!)'.
- Publish POC Data On The 'Building Info' page?:** Radio buttons for 'YES' (selected) and 'NO'.
- Buttons:** 'UPDATE This Building' and 'Home Page'.

When a building to be modified is displayed, the data fields will be pre-populated with the current information for that building. Make any desired changes by clearing the old data from a given field and then typing in the new information. Click the “Update This Building” button when all the changes are ready to be saved.

Buildings can be made “Active” or “Inactive” from this page.

## Time Slots

To set up the available appointments framework by which users may schedule their appointment to be issued a CAC via the web the “Time Slots” button on the homepage of the administrator’s site must be selected. At the “Time Slots” window, select “Create” and the issuance building, enter the dates for which the schedule is being opened, and select “Continue”.

On the Parameters for Creating Time Slots for Building (*Name*) at Site (*Name*) page, the following criteria will be entered:

- Minutes per Appointment, Number of Workstations
- Cards Issued at One Station During One Time slot (usually one)
- Time of first appointment
- Start of last appointment for the day
- Start of lunch period
- End of lunch period
- Start and end dates
- Days of the week or holidays of operation

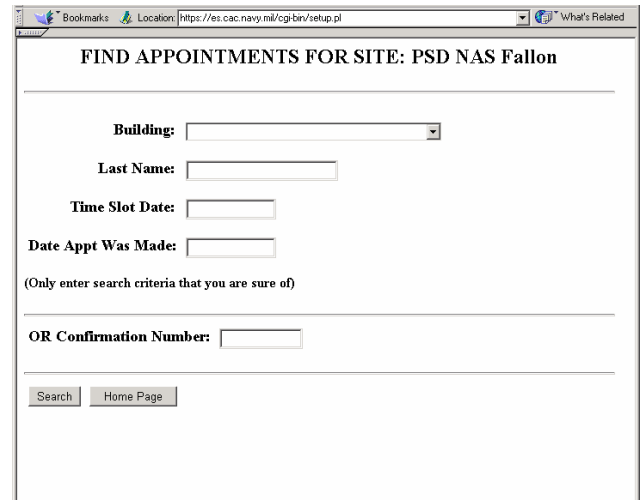
If there is more than one issuance workstation at a given building, and the appointment framework planned is different among the workstations, enter only criteria for stations with the same framework. The option will be provided to return to the “Create Time Slots” page to enter additional appointment framework approaches.

Following entry of parameters and selection of “Continue”, a “Verification of New Time Slots for Building (*Name*) at Site (*Name*)” will display the criteria just entered, including a listing of the appointments that will be available. In addition, maximum possible cards that can be issued using this appointment framework is provided at the bottom of the page. Upon selection of “Save New Time Slots” a “Save Completed” page with another recap of criteria is provided as confirmation.

## Find Appointments

Occasionally a user will call a site POC and say that they have forgotten their appointment and lost/never receive their email confirmation message. That person’s appointment information can be located using the Find Appointments feature of the administration web pages.

There are five search criteria that can be used, either alone or in combination. Just enter the desired parameter and click the “Search” button.



- Building: The building where they are scheduled to have their appointment. Used alone, it can return a long list of appointments
- Last Name: Usually the best search parameter. Used alone, it will return one, or a list of only a few appointments
- Time Slot Date: The date that the appointment was made for. Even if the user remembers the date, this parameter is likely to return a long list of appointments
- Date Appointment was Made: The date that they logged in and made their appointment. Used alone, this will usually return a long list of appointments
- Confirmation Number: The confirmation number is likely to result in an exact match. However, this information is usually lost along with the confirmation email. This number is not the same as the last four digits of the Social Security Number

If the search fails to return any results, then the message “No appointments match your search criteria” will be displayed. If the search is successful, then a list of the appointments that match the search criteria will be displayed. The location, date and time of each appointment will be shown, along with the POC data for the individual that the appointment belongs to

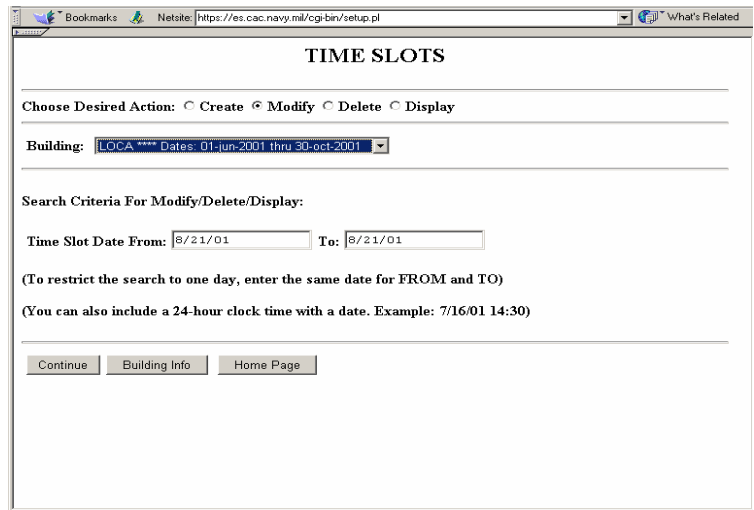
The “Home Page” button takes you back to the main menu.

## Changing the Number of Time Slot Appointments



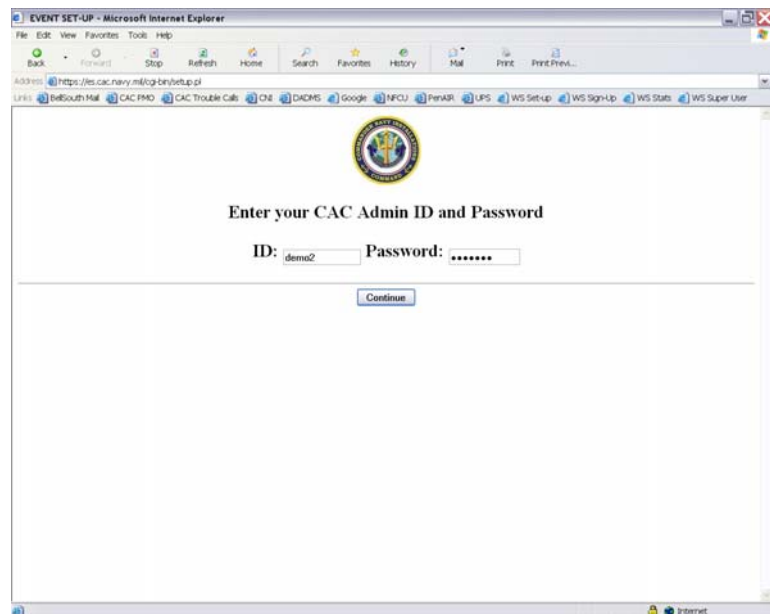
Occasionally, it may be necessary to take CAC workstations off-line. Therefore, some of those who have made CAC issuance appointments may have to be canceled by the CAC Event Scheduler Administrator.

Appointments are canceled by reducing the database entry for the Maximum Number of Appointments per Time Slot. A reduction in appointments has a one-to-one relationship to the number of machines that are off-line. It is not necessary to remove individual workstations from the database to reduce appointment availability.



The procedure described below can be used to adjust the scheduler to either reduce or increase the number of appointments scheduled for each workstation.

Use the 'Admin' URL to go to the (CAC-ES) web pages for Scheduler Administrators. Use the URL specific to the site where modifications will be made. Site specific URLs were provided via email to site administrators when their CAC-ES site was originally established. The URL in the screen capture below is a generic URL and may not direct the browser to the correct web pages.



After passing the ID and Password check, click the “Time Slots” button.

On the next screen:

- Click the “Modify” radio button.
- Select the appropriate building from the drop-down menu.
- Enter the date range for the days where adjustments to the number of appointments will be made:
  - If it’s for just one day, enter that date in both the “Time Slot Date From:” and “To:” field.
  - If it’s for a specific range of days, enter the start date in the “Time Slot Date From” field and the date of the last day effected in the “To:” field.
- Click the “Continue” button.



In the example, only one day was selected.

The next page displayed allows modifications to the maximum number of appointments per time slot, per workstation.

There are two places to change the maximum number of appointments per time slot.

1. The field at the top of the form “Fill All New Max With.” If all the time slots found require the same change, enter the new maximum number of appointments here, then use the scroll bar to go to the bottom of the web page and click the “Continue” button.
2. In the main-body of the web pages is a listing of the time slots that have been found. Enter the new maximum appointments value into the fields that correspond to the time slots that are to be modified, then use the scroll bar to go to the bottom of the page and click the “Continue” button.

In the example below, the new maximum number of appointments for the first three time slots will be reduced from five to three.

Once finished entering the desired changes, use the scroll bar to go to the bottom of the page and click the “Continue” button.

Time Slots To MODIFY For Site: TestSite

Building: LOCA

1

Fill All New Max With:  (A whole number)

OR Enter Individual New Max Values:

ROW	Slot Date/Time	Appts	Max Appts	New Max
1	21-aug-2001 07:00	0	5	<input type="text" value="3"/>
2	21-aug-2001 07:30	0	5	<input type="text" value="3"/>
3	21-aug-2001 08:00	0	5	<input type="text" value="3"/>
4	21-aug-2001 08:30	0	5	<input type="text"/>
5	21-aug-2001 09:00	0	5	<input type="text"/>
6	21-aug-2001 09:30	0	5	<input type="text"/>
7	21-aug-2001 10:00	0	5	<input type="text"/>
8	21-aug-2001 10:30	0	5	<input type="text"/>
9	21-aug-2001 11:00	0	5	<input type="text"/>
10	21-aug-2001 11:30	0	5	<input type="text"/>
11	21-aug-2001 12:00	0	5	<input type="text"/>

2

The next page will show the slots modified, the number of appointments effected, if any, and the old and new maximum number of appointments. The changes have not been committed in the database yet. There are a few more steps to go through first. Continue with the following steps:

1. Select a reason for modifying the schedule from the pop-down menu (required).
2. Enter a text explanation for the change in the E-Mail Message to Users:" field, if appropriate.

In the example below, an e-mail message has been entered for illustration, even though the parameters displayed indicate that there were no appointments for the period modified.

Time Slots To MODIFY For Site: Mechanicsburg Demo

Building: Pass & Tag

Slot Date/Time	Appts	Max Appts	New Max
07-apr-2003 09:00	0	2	1
07-apr-2003 09:30	0	2	1
07-apr-2003 10:00	0	2	1
07-apr-2003 10:30	0	2	1

Total Time Slots: 4

Approximate Number Of Appointments To Cancel: 0

Modify Reason:

E-Mail Message To Users:  
(Cancellation Reason)  
(Re-scheduling Hints)

Staffing levels are requiring us to re-arrange the Common Access Card Issuance schedule a bit. Unfortunately, we had to cancel some appointments to make the adjustments and your appointment was one of those. We are very sorry. Please reschedule as soon as conveniently possible. Thank

MODIFY These Time Slots Home Page

If there are appointments in any given time slot, the system will cancel the appointments that exceeded the new maximum number of appointments per time slot. It cancels those that were made most recently and will send system-generated explanations e-mail to the Users that contain the explanations chosen and/or typed in.

Once finished, go to the bottom of the web page and click the “Modify These Time Slots” button to commit the change in the database.

If the changes have been committed successfully, the following page will be displayed. If the maximum number of appointments per time slot can be lowered in this way, they can also be increased as necessary.



If you have any questions, please contact the CNI CAC Program Management Office at PNSC\_ISSupport@navy.mil with subject line “CAC Web Scheduler” or (850) 452-4405.